



Filing ID #10022634

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Mr. John Nehring Upchurch
Status: Congressional Candidate
State/District: FL06

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2018
Filing Date: 05/14/2018
Period Covered: 01/01/2017– 05/15/2018

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|-------|---------------------|--------------------------|-------------------------------|-----------------------|
| American Funds Smallcap World F2 [MF] | | \$1,001 - \$15,000 | Capital Gains, Dividends | \$201 - \$1,000 | \$201 - \$1,000 |
| Apple Inc. (AAPL) [ST] | | \$15,001 - \$50,000 | Capital Gains, Dividends | \$2,501 - \$5,000 | \$2,501 - \$5,000 |
| Bank of America Corporation (BAC) [ST] | | \$1,001 - \$15,000 | Capital Gains, Dividends | \$201 - \$1,000 | \$201 - \$1,000 |
| CB&T Cust Coverdell ESA John J Upchurch ⇒ American Balanced Fund 529C [MF] | DC | \$1,001 - \$15,000 | Capital Gains, Dividends | \$201 - \$1,000 | \$201 - \$1,000 |
| CB&T Cust Coverdell ESA John J Upchurch ⇒ American Balanced Fund-529A [MF] | DC | \$1,001 - \$15,000 | Capital Gains, Dividends | \$201 - \$1,000 | \$201 - \$1,000 |
| CB&T Cust Coverdell ESA John J Upchurch ⇒ The Growth Fund of America 529A [MF] | DC | \$15,001 - \$50,000 | Capital Gains, Dividends | \$1,001 - \$2,500 | \$201 - \$1,000 |
| CB&T Cust Coverdell ESA John J Upchurch ⇒ The Growth Fund of America 529C [MF] | DC | \$1,001 - \$15,000 | Capital Gains, Dividends | \$201 - \$1,000 | \$201 - \$1,000 |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|-------|---------------------|-----------------------------|-------------------------------|-----------------------|
| CB&T Cust Coverdell ESA John J Upchurch ⇒ The Income Fund of America 529A [MF] | DC | \$1,001 - \$15,000 | Capital Gains, Dividends | \$201 - \$1,000 | \$201 - \$1,000 |
| CB&T Cust Coverdell ESA John J Upchurch ⇒ The Investment Company of America 529A [MF] | DC | \$15,001 - \$50,000 | Capital Gains, Dividends | \$1,001 - \$2,500 | \$201 - \$1,000 |
| Citigroup, Inc. (C) [ST] | | \$1,001 - \$15,000 | Capital Gains, Dividends | \$201 - \$1,000 | None |
| First Florida Credit Union [BA] | JT | \$1,001 - \$15,000 | Interest | \$1 - \$200 | \$1 - \$200 |
| General Electric Company (GE) [ST] | | \$15,001 - \$50,000 | Capital Gains, Dividends | None | None |
| Gilead Sciences, Inc. (GILD) [ST] | | \$1,001 - \$15,000 | Capital Gains, Dividends | \$201 - \$1,000 | None |
| John N Upchurch Rollover IRA ⇒ American Funds Growth FD of America CL F2 [MF] | | \$15,001 - \$50,000 | Capital Gains, Dividends | \$201 - \$1,000 | \$201 - \$1,000 |
| John N Upchurch Rollover IRA ⇒ American Funds INCM FD America F2 [MF] | | \$15,001 - \$50,000 | Capital Gains, Dividends | \$201 - \$1,000 | \$201 - \$1,000 |
| John N Upchurch Rollover IRA ⇒ American Funds Investment Co of America CL F2 [MF] | | \$1,001 - \$15,000 | Capital Gains, Dividends | \$201 - \$1,000 | \$201 - \$1,000 |
| John N Upchurch Rollover IRA ⇒ American Funds Smallcap World F2 [MF] | | \$1,001 - \$15,000 | Capital Gains, Dividends | \$201 - \$1,000 | \$201 - \$1,000 |
| John N Upchurch Rollover IRA ⇒ Bank of America Corporation (BAC) [ST] | | \$1,001 - \$15,000 | Capital Gains, Dividends | \$201 - \$1,000 | \$201 - \$1,000 |
| John N Upchurch Rollover IRA ⇒ Vanguard Health Care Fund Admiral [MF] | | \$1,001 - \$15,000 | Capital Gains, Dividends | None | None |
| John N Upchurch Rollover IRA ⇒ Vanguard Mid Cap Growth Index Admiral [MF] | | \$15,001 - \$50,000 | Capital Gains, Dividends | \$1,001 - \$2,500 | \$201 - \$1,000 |
| John N Upchurch Rollover IRA ⇒ Vanguard Wellesley Income Admiral [MF] | | \$1,001 - \$15,000 | Capital Gains, Dividends | None | None |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|-------|-----------------------|------------------------------------|-------------------------------|-----------------------|
| John Upchurch PA Center State Business Checking Account [BA] | | \$15,001 - \$50,000 | Interest | \$1 - \$200 | \$1 - \$200 |
| John Upchurch PA Seacoast Business Checking Account [BA] | | \$15,001 - \$50,000 | None | | |
| John Upchurch Personal Checking Seacoast [BA] | | \$1,001 - \$15,000 | None | | |
| John Upchurch Seacoast Savings Account [BA] | | \$1,001 - \$15,000 | Interest | \$1 - \$200 | \$1 - \$200 |
| Manhattan Scientifics, Inc. (MHTX) [ST] | | \$1 - \$1,000 | None | | |
| Munder Multi-Cap Fund Class A [MF] | | \$15,001 - \$50,000 | Capital Gains, Dividends | \$201 - \$1,000 | \$201 - \$1,000 |
| NVIDIA Corporation (NVDA) [ST] | | \$1,001 - \$15,000 | Capital Gains, Dividends | \$1,001 - \$2,500 | None |
| Odyssey Travel, 60% Interest [OL] | | \$250,001 - \$500,000 | Capital Gains | \$15,001 - \$50,000 | \$50,001 - \$100,000 |
| LOCATION: Ormond Beach, FL, US DESCRIPTION: This is a travel company that has two retail travel agency locations. Odyssey Travel also hosts independent contractors that sell travel from home. | | | | | |
| Sirius XM Holdings Inc. (SIRI) [ST] | | \$1,001 - \$15,000 | Capital Gains | \$1 - \$200 | \$1 - \$200 |
| Vanguard Wellesley Income Admiral [MF] | | \$15,001 - \$50,000 | Capital Gains, Dividends, Interest | None | Not Applicable |
| VCSP/College America FBO Austin Upchurch ⇒ The Growth Fund of America [MF] | DC | \$15,001 - \$50,000 | Capital Gains, Dividends | \$1,001 - \$2,500 | \$201 - \$1,000 |

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

| Source | Type | Amount Current Year to Filing | Amount Preceding Year |
|--|---------------|-------------------------------|-----------------------|
| State of Florida Circuit Court Judicial Salary | Spouse Salary | \$66,600.00 | \$146,080.00 |

| Source | Type | Amount Current Year to Filing | Amount Preceding Year |
|------------------|----------------------------------|-------------------------------------|--------------------------|
| Odyssey Travel | Salary to John Upchurch | \$31,250.00 | \$81,250.00 |
| John Upchurch PA | Legal Fees Paid to John Upchurch | | \$30,000.00 |

SCHEDULE D: LIABILITIES

| Owner | Creditor | Date Incurred | Type | Amount of Liability |
|-------|--|---------------|--------------------------|-------------------------|
| JT | Seacoast Bank | June 2016 | Home Mortgage | \$500,001 - \$1,000,000 |
| JT | Rogerson Family Trust | May 2007 | Vacant lot on Lake Kerr | \$15,001 - \$50,000 |
| JT | Bank of America | October 2016 | Loan on Jeep | \$10,000 - \$15,000 |
| DC | Campus USA | March 2018 | Loan on Subaru Crosstrek | \$15,001 - \$50,000 |
| | COMMENTS: The loan balance is \$17,603 | | | |

SCHEDULE E: POSITIONS

| Position | Name of Organization |
|-------------|----------------------|
| Owner & CEO | Odyssey Travel |

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

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|---|
| <ul style="list-style-type: none"> CB&T Cust Coverdell ESA John J Upchurch (Owner: DC) LOCATION: FL John N Upchurch Rollover IRA VCSP/College America FBO Austin Upchurch (Owner: DC) LOCATION: FL |
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EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not

be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

COMMENTS

CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Mr. John Nehring Upchurch , 05/14/2018